

A photograph showing two women in Mozambique working at a market stall. They are processing snails, which are piled in large bowls and on the counter. The woman on the left is wearing a striped shirt and a headscarf, while the woman on the right is wearing a blue and red striped shirt and a yellow headscarf. They are both focused on their work.

SEPTEMBER 2018

Mozambique's private sector in the context of conflict

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IGC
International
Growth Centre

DIRECTED BY



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This case study analyses the interactions between conflict and private sector development in Mozambique. In the 42 years following its independence, Mozambique faced a 16-year civil war from 1976/77 to 1992, an interim period of peace that lasted 20 years, and recurring, low-level conflict involving the same belligerents since 2013. This case study examines the conflict dynamics in post-independence Mozambique, and how the private sector has developed in response to both conflict and peace.

Cover photo: Getty/Adrien Barbier

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Conflict, the economy, and politics

The war of independence, led by the nationalist movement, the *Mozambique Liberation Front* (Frelimo), ended in 1975, with Mozambique gaining independence from Portugal. Frelimo then implemented a socialist regime with a centrally planned (command) economy, in the context of a one-party political system.

The early years of independence cemented a political system characterised by the fusion of Party and State. Shortly after independence, in 1976, conflict broke out between the *Mozambique National Resistance* (Renamo) – a rural-based guerrilla organisation – and the Frelimo government. This conflict only ended in 1992, with a General Peace Agreement (GPA) being signed between the two belligerents.

Sources of conflict

External forces

There are competing views to explain the sources of the civil war in Mozambique.¹ One view regards it as part of the destabilisation efforts of the white minority regimes of the Southern African region, namely South Africa and Rhodesia (today, Zimbabwe), as a proxy war at the height of the Cold War.

Internal discontent

Alternatively, conflict may have resulted from growing internal discontent among

¹ Throughout the paper, the term mostly used will be civil war, since despite its different meaning, the armed conflict has progressed to a stage where internal causes play a dominant role and its renewal in 2013 stems more from internal than external causes, as will be explained throughout the sections. A more neutral expression that will also be used is the 16-year war, which refers to its duration.

the local population with the post-independence socialist regime, which led to increased support for Renamo, particularly in central and northern Mozambique. It is likely that both factors contributed to the onset and persistence of the conflict (For more details, see Vines, 1991 and Geffray, 1991).

Poor administrative capacity

After independence, an estimated 200,000 Portuguese settlers and their descendants fled the country, leaving capacity gaps in public administration and in the management of companies. The colonial system had done little to promote the participation of qualified Mozambicans in governing institutions and economic assets. The newly created government therefore faced enormous challenges once it nationalised or intervened in all the companies that were either regarded as strategic for the existing political objectives or that were left behind by the former settlers.

Economic shock

The economic shock generated by the civil war, and the failure of the command economy based on parastatal control, led the government to change course. In 1984, Mozambique joined the International Monetary Fund (IMF) and the World Bank. As a result, in 1987, Mozambique launched a structural adjustment programme named the *Economic Rehabilitation Program* (ERP).

The economy

In 1990, ERP was augmented and renamed the *Economic and Social Rehabilitation Program* (ESRP), to account for the negative social effects of the civil war. ERP and ESRP involved the privatisation of state enterprises and state divestiture in the business sector. The Mozambican privatisation programme is considered among the most radical in Africa, with more than 1,200 state-owned companies being privatised by 1999 (Arndt, Jensen, & Tarp, 2000) (Cramer, 2001).

A new pluralist Constitution paved the way for the first multiparty elections in 1994, which led to the victory of Frelimo and its candidate, the incumbent president Joaquim Chissano. Despite the refusal to include Renamo in a government of national unity, the President kept a cordial relationship with Renamo's leadership, with frequent dialogue.

A small proportion of the guerrilla movement combatants were integrated into the national army, whilst others took up positions in Parliament and in bodies such as the National Elections Commission, the State Council, and the Constitutional Council.

Post-war Mozambique cemented Frelimo's control over the State, and despite the introduction of market economy reforms through the Economic Rehabilitation Program (ERP), the overlap between Party, the State and business continued. This likely constrained access to economic opportunities, employment in public service and even to public funds for non-party members (Orre and Ronning, 2017).

Politics

Chissano's successor, Armando Guebuza, further strengthened the party's control over the state and continued to side-line Renamo, which culminated in a new electoral law approved in 2012/13, without the consent of Renamo. Low-level conflict soon returned to Mozambique in the form of skirmishes between government forces and armed Renamo men, as well as attacks on traffic on specific stretches of the country's main North-South highway, particularly in Sofala province.

Peace agreement

This phase of the conflict ended with the signing of the *End of Hostilities Agreement* (EHA) between President Guebuza and long-time Renamo leader, Afonso Dhlakama, on 5 September 2014. Following up on the EHA, in November 2014 the Government created a *National Peace and Reconciliation Fund* (NPRF) to support skill development, income generation, and economic investment among civil war veterans.

Elections and tensions

The EHA established the conditions for the October 2014 general elections, in which the Frelimo candidate, Filipe Nyusi, won the presidency. However, the EHA did not prove sustainable, as Dhlakama did not accept the election results. He held rallies across the country, attracting large crowds, where he demanded the right to appoint the governors of the six provinces he claimed to have won.

Despite two meetings with President Nyusi in early 2015, where it was agreed that Renamo would submit a legislative initiative to Parliament regarding elected provincial governors, tensions increased further during the year, culminating in violent attacks on Dhlakama's motorcade in September 2015. The Renamo leader returned to his hide-out in the Gorongosa mountains and the EHA was definitively off-track.

Negotiations

Negotiations only restarted in mid-2016, with a fresh team of both national and international mediators and a clear agenda, which included decentralisation and autonomous provinces. Although the process had several shortcomings, and was discontinued in December 2016, it did prepare the ground for renewed trust between Nyusi and Dhlakama, and the cease-fire that was announced on 26 December 2016.

Negotiations resumed in 2017 in a new, much more modest format, with two very small specialist groups dedicated to decentralisation and military issues (Weimer and Carrilho, 2017). This effort eventually bore fruit, as President Nyusi announced in February 2018 that he and Dhlakama had reached a "deal" on decentralisation.

Decentralisation

Although the deal suffered some alterations, it survived the death of Dhlakama in May 2018, and has since led to a Constitutional amendment and new municipal election legislation. Under the arrangement, districts, municipalities and provinces will have elected assemblies, and the district administrator, mayor and provincial governor will be the head of the list of the party winning the most votes in the respective assembly.

The above developments represent a major change to Mozambique's political economy. Reaching this point was by no means straightforward or inevitable, as both party leaders faced hardliners within their own ranks who tried to obstruct progress at key junctures.

Photo: President Armando Guebuza and RENAMO leader Afonso Dhlakama. Credit: Voice of America



Enterprise and external resources

State-owned enterprises dominated the entrepreneurial landscape in the immediate aftermath of the civil war. Even after a massive privatisation programme in the 1980s and 1990s, public enterprises continued to be among the largest companies in the country, with the role of the domestic private sector remaining limited.

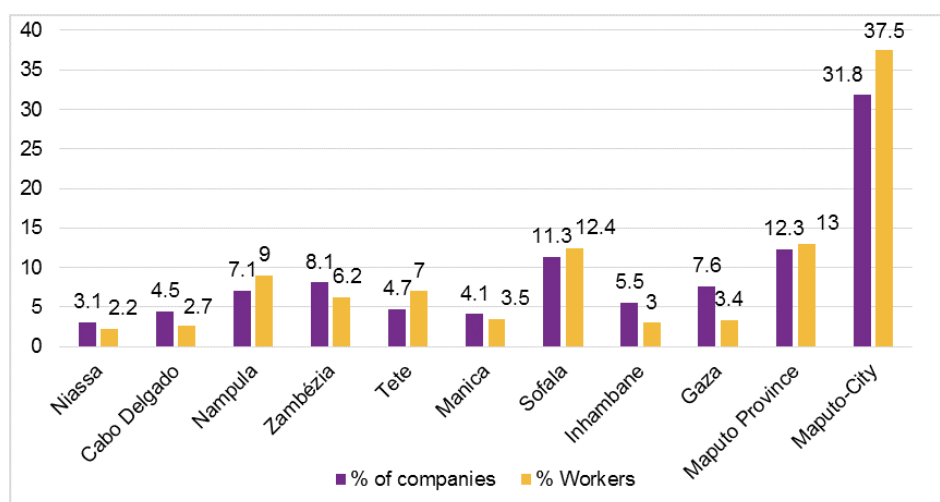
Firms and employment

Only in recent years, mainly with the inflow of foreign direct investment (FDI) in mining and services, and the progressive gains in agribusiness, has the private sector gained more ground. However, private sector development continues to revolve around relatively large firms.

These dynamics are reflected in the structure of the economy, which is marked by small domestic private ventures, a far more limited number of mid-sized firms, and large state-led and foreign enterprises, geographically concentrated around the capital.

According to the Enterprise Census of 2014/15 (Instituto Nacional de Estatística/ INE, 2017), 40% of the country's companies and 45% of its labour are located in or around Maputo (Figure 1). The provinces of Nampula and Zambézia represent about 38% of the country's population but host only 15% of the enterprises and a similar share of employed people.

Figure 1: Companies per province and % of workers



Source: Enterprises Census 2014-15

Figure 2 shows that most enterprises in the country are in commerce (59%), hospitality (9.6%), and manufacturing (6.7%). Most workers are employed in commerce (25.3%), manufacturing (12.5%), construction (10.6%) and hospitality (8%). When we include the informal sector, agriculture is responsible for about 80% of employment, despite its more modest share of gross domestic product (GDP) (22.3% in 2016).

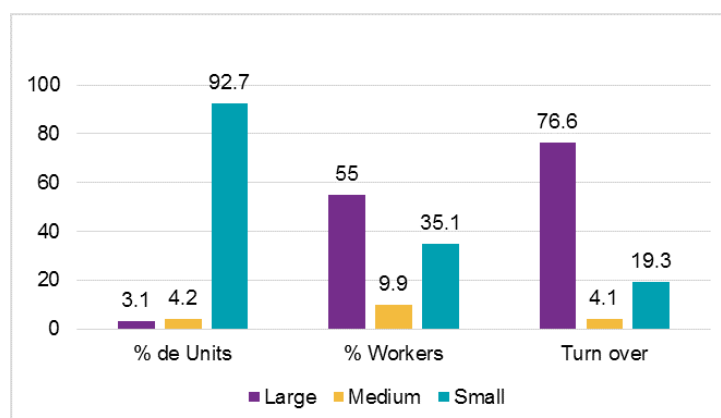
Figure 2: Enterprises per activity area



Source: Enterprises Census 2014-15

Large companies account for only 3.1% of the total number of units but employ 55% of workers and are responsible for 76.6% of national turnover (Figure 3). The export sector, in particular, is dominated by 13 companies, covering four main resources (aluminium, electricity, ores and gas) and accounting for about 63% of exports. The remaining 37% are concentrated around a limited number of companies, largely in six sub-sectors: tobacco, wood, sugar, cashew, flour and prawns (Sutton, 2014).

Figure 3: Company size by % of units, workers, and turnover



Source: Enterprises Census 2014-15

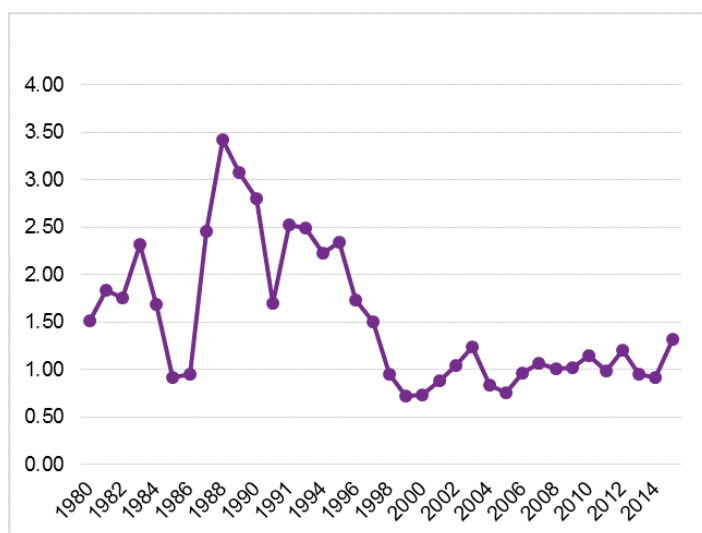
External resources

Due to its weak domestic private sector and limited tax base, Mozambique has been a country heavily dependent on external resources, through FDI and development aid. When combined with remittance inflows, these resources represent a critical contribution to the country's foreign currency reserves.

Migrant labour, mostly to South African agriculture and mining companies, has been one of the main sources of remittance inflows in the colonial and post-independence periods. Remittances were an important source of foreign exchange during the civil war and the immediate post-war period, as the security situation caused a slump in other key activities for the balance of payments, namely the export of goods and of services.

Remittance inflows to GDP reached about 3.5% in 1988 and remained above 2% in most of the subsequent years, only to start declining below this figure in 1996. By 2015, remittances represented 1.3% of GDP (Figure 4).

Figure 4: Remittance inflow as % of GDP, 1980-2015



Source: Federal Reserve Bank of Saint Louis, 2017

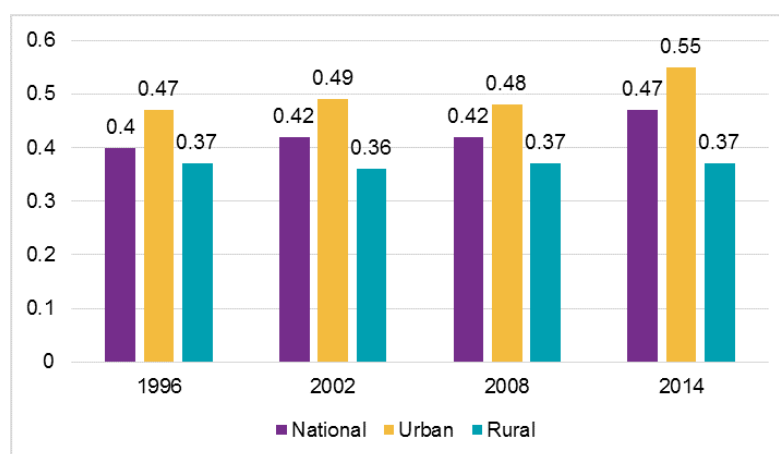
The social and political impacts of conflict

Inequality

Inequality has been a major element of political tension involving the two former belligerent parties, with significant implications for the private sector. While the Gini Index measuring income-inequality has remained constant in rural areas over a period of 18 years, it has been increasing quite significantly (i.e. rising inequality) in urban areas and in the country overall in recent years (Figure 5).

Southern Africa is a region marked by high within-country inequality, as evidenced by the fact that six of Mozambique's neighbours (South Africa, Namibia, Lesotho, Zambia, Botswana and Swaziland) are in the list of the 19 most unequal countries in the world, according to the United Nations Development Programme (UNDP) report on inequality (United Nations Development Programme, 2017). All these countries have Gini indices above 0.5 (where 0 represents perfect equality, and 1 represents perfect inequality).

Figure 5: Gini Index 1996-2014



Source: Ministério da Economia e Finanças, 2016

Public resource allocation

Regional inequality in Mozambique has not been offset by the allocation of public resources, with the central level concentrating a great share of the budget resources for capital (more than 80%) and recurrent expenditures (over 50%) (See State General Accounts of 2010, 2011, 2012, 2013 and 2014).

Moreover, access to natural resource concessions for land, forestry and mining has been a continuous source of rents for the political elites, particularly for the ruling Frelimo. Renamo has had relatively more limited access to natural resource concessions, to contracts with the public sector, and to linkages with any of the mega-projects, such as Mozal or Sasol.

A study has shown that ruling party affiliation increased the likelihood of obtaining mining licenses, suggesting that political connections matter (Monjane, 2014). Due to the undercapitalisation of those with access to these assets, the concessions are then normally traded to investors or used to mobilise capital for investment.

Access to opportunities

Unequal access to economic endowments and opportunities has extended to the participation in public-private-partnerships, and to the boards of state enterprises or multinational megaproject investments. Non-executive administration positions on the management boards of these companies have usually been reserved for members of the ruling party.² This imbalance in access has been a recurring element of negotiation between the parties and was historically a driver of dispute and conflict.

The power imbalance within the private sector also showed during periods of unrest, when safety and security became a paramount concern for the private sector. This distorted the allocation of resources away from the production process towards measures to defend their operations in coordination with the national army. Violence ended up benefitting those who were able to strike these security arrangements.

While the development of the private sector was far from inclusive or balanced in Mozambique, the control exerted by the State on key elements of the economy meant that it was able to prevent the collapse of the private sector during periods of unrest. For instance, during the civil war, the government succeeded in ensuring the continuation of production to thwart the destabilisation effort. As a result, state-owned companies and a few private firms overcame the hardships of war and kept the economy functioning to avoid economic collapse.

² Public companies such as Electricity of Mozambique (EDM) have been contracting out to companies of the ruling party elite, even at the expense of the quality of services (Nhamire, 2015; Nhamire and Mosca, 2014). Companies that have been involved in linkages with the megaprojects normally have a record of previous linkages with the state, which was the only entity with the capacity to contract on a large scale in the 1990s. This previous linkage contributed to the companies' experience and capitalisation, needed to match the high standards demanded by large-scale investment projects, meaning that previous connections, among them political ones, matter (Castel-Branco, Langa and Mandlate, 2015).

State dependence

The private sector in Mozambique has failed to leave its mark on the peace negotiations and its aftermath due to a relatively high degree of state dependence and ruling party influence. This is illustrated by the fact that all the presidents of the national Confederation of Business Associations so far have been from the ruling party (and in some cases were even members of Parliament). The organisation received state funding until 2017, when it unilaterally renounced it.

It should be noted that the private sector's dependence on the central state is inherently linked to Mozambique's political settlement, in which Frelimo, by virtue of its historical liberation struggle credentials, has dominated the state, in a highly centralised fashion (Weimer and Carrilho, 2017).

In this respect, Mozambique is by no means an exception in the region, or in the wider developing world. Similar dynamics are, or have been, observed in countries such as Angola, Namibia, Zimbabwe, Tanzania and others further afield, including Malaysia and Vietnam. This list is indicative of the wide range of economic outcomes that are possible within a system characterised by a fusion of party and state, and that their disentanglement often represents a gradual process that can take many years.

In the particular case of Mozambique, this feature of the political settlement has meant that all serious private sector endeavours have had to rely on connections with the same group of state- and party-related individuals in Maputo, which serves as a partial explanation for the lack of a pro-active, diverse and dynamic local business constituency.

Power dynamics

The introduction of electoral politics following the 1992 GPA did not fundamentally alter this picture. Although the private sector adapted to the new situation, it remained focused on reproducing and consolidating its power, for which it still depended on the ruling party.

The experience with the revival of the sugar industry in Maragra, Mafambisse, Marrromeu and Xinavane (Buur, Baloi, & Mondlane, 2012) illustrates these dynamics. The recovery of this sector was driven by the realisation of the need to revive a dying rural economy and create jobs. The government revitalised this industry by attracting FDI with tax incentives and ensuring a market for sugar through protectionist measures.

In the case of Maragra and Xinavane, local farmers were integrated as sugarcane growers to supply raw material to factories. The experience was successful, creating significant employment in rural areas, while also opening up upstream and downstream opportunities that led to the emergence of several small and medium sized businesses.

There was also a strategic interest in creating jobs and in integrating demobilised soldiers in areas that were traditionally pro-Renamo, such as Mafambisse in the province of Sofala (Buur, Baloi, & Mondlane, 2012). In this sugar estate, access to employment was mediated through party structures, which was a concession of the company after Frelimo local party structures

expressed their concerns and dislike for the recruitment of people that supported the opposition (Buur & Sumich, 2017).

If recent progress in decentralisation were to bring effective changes to the organisation of Mozambican politics, this could potentially lead to the emergence of more diverse interests, distinct from those of the ruling party. The private sector will likely adapt to this new reality by forming connections with the newly emerging powerbrokers at the local level. The implications of this scenario could be very different from the way the private sector adapted to the post-war environment in the 1990s and the introduction of a first phase of electoral politics.

Photo: Maputo's harbour. Credit: CC BY.



The economic impacts of conflict

The private sector

Estimates of the damages caused by the civil war are in the order of US\$ 15 billion (Hanlon, 1991 and Pitcher, 2002: 104). The conflict affected all spheres of the Mozambican economy, with the exception of fisheries, since Renamo did not have boats to attack this sector (Pitcher, 2002: 104). Throughout the conflict and in its immediate aftermath, the private sector continued to suffer from a lack of management skills, low levels of human capital, disrupted supply chains and limited access to credit (Pitcher, 2002: 101).

Production and infrastructure

At the time of independence, Mozambique ranked as the 8th most industrialised country in Africa (Pitcher, 2002), with industry contributing 10% to GDP (Cruz, Guambe, Marrengula, & Ubisse, 2016). By the mid-1980s, industry was operating at between 10% and 30% of its capacity (idem).

The 16-year civil war had a significant impact on the economy. According to official data, the war destroyed or damaged about 39.7% of existing immobile capital, including critical socio-economic infrastructure related to agriculture, water supply, domestic trade, communication and public administration (Brück, 1997: 36).

Civil war led to a 30% decline in agricultural production and a 75% decline in exports by 1986 (Kyle, 1990). Export-oriented agriculture was severely affected due to the destruction of irrigation, transportation and logistics infrastructure, as well as the pervasive insecurity experienced in the country-side (Brück, 1997). Less than a fifth of the recorded cattle stock in 1980 remained in 1992, and from 1982 to 1988, the commercial network for agricultural marketing was reduced by 30%, at a 5% average rate per year (idem).

Human capital

The war had a large impact on human capital as well. About 25% of the population was internally displaced during the war and an additional 10% were living as refugees in neighbouring countries (Brück, 1997: 40-42). Moreover, data from the Ministry of Education shows that 3,402 out of 5,886 primary schools were destroyed or closed between 1983 and 1991, thus compromising human capital and entrepreneurial capital accumulation for decades to come (Brück, 1997).

Transport

The destruction of roads and transportation infrastructure also impacted negatively on the balance of payments, since Mozambican ports and railways were an important transport and logistical hub for a large landlocked hinterland, including countries like Zambia, Malawi and Zimbabwe. Together with the reduction in remittances received during this period, both factors led to significant constraints on the availability of foreign exchange (Kyle, 1990: 7; Brück, 1997: 38).

Photo: Mozambican farmer. Credit: CC BY.



Post conflict

Recovery and growth

After the 16-year civil war, three sectors responded in a significant way: tourism, banking and the extractive industries. The tourism sector has grown considerably, since entrepreneurs had the opportunity to explore the vast natural resources of the more than 2500km of the Mozambican coastline and its national parks.

This sector has proven, however, to be very sensitive to the deterioration of security. Thus, it started to pick up after the 2014 End of Hostilities Agreement (EHA) but fell back when the conflict escalated in 2015 and has since recovered with the announcement of the truce in December 2016.

The Mozambican banking system has also expanded rapidly, although it experienced some major problems in the earlier part of the decade. Financial scandals connected to illegal contraction of public loans and the acquisition of weapons damaged the reputation of the country among the donors responsible for funding most of the country's fiscal deficit. Moreover, the banking system in Mozambique remains heavily politicised with political figures placed in the top managerial positions of the largest banks.

Despite these constraints, according to the data of the National Statistics Institute (INE), the banking industry experienced the second-highest average growth rate between 1992 and 2016, at 15.2%. Its growth was only surpassed by the extractive industries, with an average growth rate of 18.5%.

Peace arrangements and the private sector

The peace arrangements led to the presence of Renamo representatives in many institutional structures, both inside and outside Parliament, though only a relatively small fraction of the Renamo elite was in fact accommodated. While some Renamo leaders obtained concessions in the extractive industries, these often came under scrutiny during conflict flare ups with the aim of limiting the financing of armed guerrillas.

It is noteworthy that the private sector was still relatively more likely to accommodate ex-Renamo combatants than the public sector, which remained

virtually the realm of the ruling party.³ Path dependence may have perpetuated these political imbalances. As shown in Table 1, associates to the ruling Frelimo party continue to own the majority of firms in the country, regardless of the size or the level of formality of the business.

Table 1: Owner's political affiliation by firm type

	Frelimo	Other political parties	No answer	No. of observations
All	32.9	0.9	16.4	761
Micro	38.7	0.8	13.0	517
Small	22.5	1.7	22.5	178
Medium	15.2	0.0	27.3	66
Informal	36.1	1.8	12.0	166
Formal	31.7	0.7	17.7	593
Mozambican owned	36.4	1.0	15.8	676
Foreign owned	4.8	0.0	19.3	83

Source: Ministry of Planning and Development, 2013: 58

Integration

During the post-war period, Mozambique engaged in several attempts to improve the country's business environment. The government approved laws on business licensing, created a Unit for the restructuring of enterprises operating within the Ministry of Finance (UTRE), and developed various business development programmes, mostly with external donor funding.

Training and education programmes were also designed to promote private sector development and employment generation. None of these were, however, designed or directed towards conflict-related inclusiveness, such as targeting demobilised soldiers as part of the peace building process.

The National Peace and Reconciliation Fund

This changed in September 2014 when, as part of the EHA agreement, the Government created the National Peace and Reconciliation Fund (NPRF), aimed at supporting projects of demobilised soldiers of the regular army who fought during the 16-year civil war, liberation struggle fighters, and Renamo demobilised guerrilla forces. The NPRF was designed to finance self-employment, skills and capacity development projects, and seeks to promote linkages between investors and ex-combatants with land licenses and natural resource concessions, in order to capitalise their assets.

³ A short-lived exception was the appointment of Benjamim Pequeno to CEO of the Postal Services from 2000 until 2006.

Renamo

And yet, the NPRF has struggled to reintegrate demobilised soldiers, particularly those from Renamo. When the NPRF was created, Renamo demanded parity of representation with government representatives on its board. This was not accepted by the Government and Renamo decided to not appoint any representatives to NPRF. However, some Renamo members have received funding from the NPRF and part of them were showcased by the government to entice and co-opt other members.⁴

When the conflict reignited with more intensity in 2015, after the general elections of 2014, it became clear that the fund had fallen short of contributing to the reintegration of Renamo soldiers into the economy. Renamo was then still pushing for a broader settlement that included the direct election of provincial governors, participation in economic opportunities along with Frelimo elites, and integration into the army and security services.

Some of these demands were partially accommodated in the Constitutional revision of 2018, following an agreement on decentralisation between the President of the Republic Filipe Nyusi and former Renamo leader Afonso Dhlakama in February 2018.

⁴ In its resolution to facilitate linkages between combatants with access to natural resource concessions and licenses and investors/partners, the NPRF has initiated projects of mining, biofuels and agriculture in the provinces of Zambézia, Tete and Maputo. The agreements for these projects normally involve combatants individually or in associations, the fund Holding, and investors that can bring know-how to the business.

Lessons learned and future outlook

The role of the private sector in conflict and in the peace building process is a clear reflection of Mozambique's history and idiosyncratic characteristics.

- Inequality and exclusion of key political actors has historically fuelled conflicts. Adequate attention ought to be placed on facilitating the integration of former combatants and ex-political leaders into governing structures so as to mitigate the chances of a relapse into conflict.
- A state-led business sector becomes inevitably embroiled into conflict dynamics. It is thus unable to show leadership in peace negotiations, mainly when it is involved in the very same politics that caused the conflict.
- Initiatives that are aimed at integrating historically excluded groups in the economic and social sphere, through business initiatives, if not properly sheltered from the negative dynamics of politics, might aggravate rather than ease tensions.
- At the same time, not all of those affected by conflict have to be incorporated into the private sector. Ideally, any private sector promotion activities among communities exposed to conflict should try to identify the optimal firm size, level of managerial capital, and market opportunities to be seized to ensure their success.
- Successful economic initiatives involved a close relationship along the value chain, with a linkage scheme between growers and industry, based on easily acquirable technical and business skills. For example, the sugar sector involved farmers already knowledgeable of the crops, and providing them with support to develop their technical and managerial capacity, which made linkages with the sizable investment viable and sustainable.
- The National Peace and Reconciliation Fund (NPRF) represented a good opportunity to use targeted programmes with an economic focus to promote a lasting peacebuilding effort. Nonetheless, its effectiveness will depend on the capacity to truly integrate beneficiaries across party lines in a transparent and inclusive way for the promotion of an efficient and dynamic private sector.
- Recent progress on the decentralisation debate, following the February 2018 “deal” between president Nyusi and Dhlakama, is a development that could

usher in a new phase in the evolution of Mozambique's political economy. In particular, it could allow for the emergence of a domestic private sector that is more diverse, dynamic and not as dependent on the central State.

Photo: Cargo at the Port of Maputo. Credit: Louise Gubb/CORBIS SABA/Corbis via Getty Images.



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